UPlan Weekly Digest

Friday, April 14, 2017

Bug Fixes & Enhancements:

• Reference the <u>UPlan Enhancements</u> page for a complete list of enhancements relevant to the last fiscal year.

Known Issues:

• Saved Smart View Workbook Cannot Connect to the Revenue and Expense – Level C Form: If you try to connect a saved Smart View workbook to the Revenue and Expense – Level C form, you will encounter an error. The reason is when we modified the Task List to include the Forecast Approved Revenue and Expense Level C form, the Task List automatically changed a different number next to the Revenue and Expense Level C form's name. As a result, this changes the path of where the form was originally saved.

Previous Task List Current Task List Smart View **Smart View** ▼ X Task List Task List Server: uplan.ucsf.edu Server: uplan.ucsf.edu Application: UPlan Application: UPlan General Planning General Planning ~ ☐ ○ 1.0 Revenue and Expense - Level C ... O 1.0 Revenue and Expense - Level C 1.1 Revenue and Expense - Level C 2.0 Revenue and Expense - Level E O 1.2 Fcst Apprd - Rev & Exp Level C O 3.0 Tuition and Fee Revenue Calculator 2.0 Revenue and Expense - Level E 3.0 Tuition and Fee Revenue Calculator — O 6.0 ResetCompletionTracking O 6.0 ResetCompletionTracking Open Form Open Form Mark Complete Mark Complete **Task Details ^** Task Details 2

The workaround is to either:

- Reload each worksheet from the Smart View panel on the right by connecting to 1.1 Revenue and Expense – Level C or 1.2 Fcst Apprd – Rev & Exp Level C Form > Change POV to match the DFP in the worksheet name > Refresh. (As a reminder, this would erase any saved formulas in your worksheet unless you copy/pasted them out and back after refreshing the form).
- o Recreate all workbooks/worksheets from scratch, copy/pasting any formulas you may have saved.
- Reference the <u>UPlan Known Issues</u> page on our website for a complete list of unresolved issues. As known issues are resolved, they will be announced under "Bug Fixes & Enhancements".